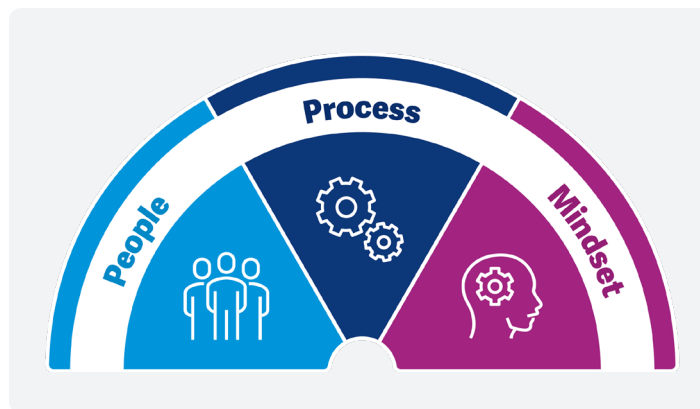


Procurement with Purpose: Developing Effective Requirements for Special Education Technology Projects

By Jennifer Hanson and
Jacob Klett

Leading effective special education programs in public school districts demands careful navigation of complex and competing priorities such as ensuring compliance with state and federal mandates, delivering high-quality instruction, monitoring program effectiveness, and collaborating meaningfully with families of students with Individualized Education Programs (IEPs). Special educators, however, face significant constraints on their time: less than half the school day is spent on direct instruction, while nearly a quarter is dedicated to documentation, administration, and collaboration.ⁱ This imbalance reflects broader, systemic challenges in which district special education programs narrowly focus on procedural mandates rather than meaningful student outcomes. To break this cycle, districts must center their efforts around three critical levers: people, process, and mindset. Making this shift requires the development of data-informed strategies to move special education programs toward a culture of ambitious expectations and continuous improvement.ⁱⁱ



Strategically selected technology plays a critical role in this transformation, particularly when it supports collaborative IEP development (people), efficient workflows (process), and data-informed decision-making (mindset). Many special education platforms now offer centralized data management systems that allow districts to access student records,

monitor compliance with timelines and procedures, and assess staffing needs.ⁱⁱⁱ When used proactively, IEP data can also surface patterns, support equity, guide professional development, and inform programmatic and policy decisions.^{iv} Realizing this potential, however, depends on how such technologies are procured. A well-designed, student-centered Request for Proposal (RFP) process enables districts to select technological solutions that do more than check boxes to meet compliance requirements but rather serve a critical function to facilitate shifting the district's culture toward ambitious expectations, improved instructional practices, and stronger outcomes for students with disabilities. RFPs are not just procurement tools; they are strategic levers for systems change. Despite the promise of the RFP process to facilitate meaningful change for students and district stakeholders, a 2024 survey revealed that only one in four leaders have a minimal understanding of the purchasing process in their district^v indicating the need for strategic guidance to ensure the RFP process lends itself to the specialized solutions each district's students deserve.

Aligning Solutions to Needs

When developing an RFP for a special education technology solution, leaders must first assess the need for change, the foundations for change readiness, and have a clear understanding of the challenges to be solved through the implementation of a technology solution. District leaders may have a general sense of educator and other stakeholder frustration due to the limited capacity of current district systems, processes, or staff responsibilities, pointing toward the need for an RFP process. However, before launching an RFP, leaders should pause to carefully consider the problems or challenges the RFP and subsequent change in technology systems are intended to address, as doing so helps establish that the content of the RFP is strategically pointed toward the right solution.

Armed with a clear understanding of the district's biggest hurdles, it is also important to evaluate which existing district processes need to be preserved, such as methods for providing IEP at-a-glance snapshots to general education teachers, establishing equitable caseloads for special educators, or collaborating with assessment coordinators around student accommodations. Structuring the RFP to address how the implementation of a new technology solution is to be layered upon current successes promotes clarity to potential vendors about the full scope of the district's needs, leading to reasonable timelines for solution development and delivery.

The Critical Role of Stakeholders

Engaging with key stakeholders who offer a variety of perspectives early and often during the RFP process is a crucial success factor. For example, RFP requirements may come from different perspectives and user needs, such as the need for adherence to state and federal regulations, programmatic data reporting for district leaders, or ease of student progress reporting for educators. The applicability of user requirements may also impact the funding mechanisms through which the district plans to finance its purchase. A common structure for facilitating stakeholder input to the RFP development process is through the formation of an RFP committee. When convening such a committee, inclusion of stakeholders who are familiar with various requirements and from across organizational levels supports the district in landing on a balanced solution that considers multiple user roles and types. When recruiting members of an RFP committee focused on an electronic special education system, districts should consider leaders such as the district's special education director, campus principals, special and general educators, as well as additional users of the system, like nurses, transition coordinators, or related-

What is an RFP and When Do Districts Use Them?

A request for proposal (RFP) is a process districts use to solicit bids from external, third-party vendors. An RFP details specific needs of the district that potential vendors use to submit proposed products or services aligned to address those needs. Districts may leverage an RFP process in cases where the organization does not have the available internal capacity to fully address the identified needs and therefore requires external support. There may also be regulatory requirements that necessitate an RFP process. A competitive RFP process allows the district to select a vendor best equipped to meet the district's needs, while adhering to local and state procurement requirements. A standardized RFP process ensures the district is considering all necessary components, including requirements documentation, vendor evaluation, negotiation and contracting, and performance evaluation. District factors related to the RFP process may also include conflict of interest policies, purchase order management procedures, and supplier performance monitoring.

services providers. Districts may also find value in engaging with families of children with IEPs or reviewing available data around parent satisfaction with the IEP process to inform the composition and priorities of the RFP committee. Additionally, the inclusion of experts in purchasing, legal, and finance as stakeholders of the district's RFP committee may support decision-making around available funding streams and the project budget.

Building internal support goes beyond simply inviting the appropriate stakeholders to participate. There are key players at the district who may not contribute directly to the RFP process but whose backing is critical in promoting the eventual solution. These champions of change can include superintendents, chiefs, or school board members, each of whom can affect the success of the implementation by signaling their support. To engage these champions, consider highlighting how this change would impact them and their constituents and keep them informed as the RFP process unfolds to continue to leverage their support.^{vi}

The following guiding questions are provided to support school district leaders and other stakeholders in analyzing the current landscape of special education and other operational needs when developing an RFP for a technology solution. These questions promote data-informed discussions and can support RFP committees in drafting clear and concise RFP language to facilitate solutions best aligned to help them address their pressing challenges.

Special Education Compliance

Electronic solutions for IEP development must address federal, state, and local compliance requirements.

- ✓ Are IEPs and evaluations currently being completed on time? Do case managers have an easy way to identify past due events and upcoming timelines? What tools can help facilitate parent/family communication?
- ✓ Are IEPs and evaluations completed with sufficient detail? Do IEP teams consistently overlook required components? If so, which ones? Does the current IEP system allow the district to customize error checks to better support compliance?
- ✓ How is data collected to support instructional decision-making for students, determine trends, and support continuous improvement planning? Are there specific priorities or metrics the new system will support?
- ✓ Do IEP teams have access to multiple sources of data to inform decisions about Least Restrictive Environment (LRE) and placement along the continuum of services? In what way will the new system support inclusive service delivery for students with IEPs?
- ✓ How do general education teachers engage with a student's IEP? Are those operations effective? How will those operations look in a new system? Is there an efficient way to generate these documents in the new software?
- ✓ How are progress reports provided to parents/families? Is there accountability to ensure every student with an IEP has a progress report generated at the same frequency that other report cards are generated? How do providers coordinate the dissemination of these reports?

Operations and Cybersecurity

Data processing capabilities and security measures are critical when evaluating a potential software solution.

- ✓ How will data from the district's current system be imported into the new system? Consider the need for continuity of IEP dates, annual IEP goals and objectives, progress reports, and student demographic information. How will users be alerted when an IEP deadline is pending?

- ✔ What other district software systems must be integrated with the new IEP system? How often does data need to be shared across platforms?
- ✔ What approaches to risk mitigation related to the protection of student data are essential to the new IEP system?
- ✔ Has a potential vendor experienced a past security breach? How long ago did it occur? What risk mitigation steps have they taken since then?
- ✔ Will the new IEP system include multi-factor authentication, such as the use of email plus phone authentication to log in?
- ✔ What structures are in place to protect servers and databases? What monitoring exists?
- ✔ What structures are in place to protect against phishing or other natural human risks (training, account structures, etc.)?

District Community and Student Demographics

The broader needs of the communities served by the district, including the needs of students and families, should be considered when considering potential solutions.

- ✔ What is your district's Multilingual Learner population? Does the software provide supports for parents/guardians who are not native English speakers to facilitate engagement with their child's education?
- ✔ Does your district serve low-income communities? Does the software provide integration opportunities with Medicaid billing to support efficiency for your teachers and providers?
- ✔ Does the software support your district's Behavioral Threat Assessment procedures? Forty percent of threats in schools come from students in special education.^{vii}
- ✔ What customization does the software allow for district-specific procedures and reporting? Are those fees ongoing or one-time?

Vendor Selection

RFP scoring criteria with clear alignment to identified needs helps ensure the selection of a best-fit vendor.

- ✔ Does this vendor specialize in developing software for special populations? Is the software specific or customizable to your state's requirements?
- ✔ Has the vendor ever done an implementation for a district of your size and/or demographics? If not, what leads the RFP team to believe the vendor will be successful? Are there risk mitigation strategies needed to facilitate the vendor's success?
- ✔ What flexibility can the vendor offer to address the unique needs of the district? Can they accommodate customization, and is that level of customization financially feasible?
- ✔ Does the district's implementation timeline allow sufficient time to collaborate with the vendor and plan for unique district needs? If the vendor can offer customization, is the implementation timeline for customization realistic?

School districts work tirelessly every day to achieve important goals like compliance with the Individuals with Disabilities Education Act (IDEA), data-informed program improvement, parent/family engagement, and meaningful student progress monitoring. With intentional and thoughtful design, a district's RFP process can, and should, be a meaningful tool used to select technology solutions that truly strengthen district programs serving students with disabilities.

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Endnotes

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